

TRUSTEE EDUCATION INSTITUTE

PARTICIPANT MATERIALS

SEPTEMBER 23-25, 2020



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

WELCOME

Dear Attendees:

We look forward to welcoming you September 23–25 to the 2020 Trustee Education Institute.

We have ambitious plans for our time together.

This year has posed a number of significant challenges; however, it has also surfaced extraordinary opportunity. In the midst of a crippling pandemic, insidious racial injustice, and devastating natural disasters, a glimmer of hope has emerged—awareness. Individuals and families across the world are acknowledging—many for the first time—the underpinnings of persistent and existential challenges to healthy, sustainable, and vibrant communities. As a result, philanthropy is being called upon to activate in new and challenging ways—to reflect on what’s possible and to embrace the unfamiliar. At this year’s Institute, we will highlight inspiring stories, elevate effective practices, and challenge you to reflect on how you might act differently. It’s more important than ever to lean on one another and into your role as a steward.

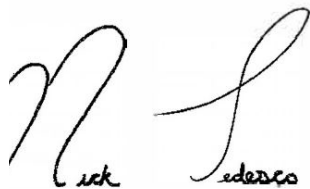
A virtual Institute does, of course, pose challenges to the valuable networking that is often a feature of our events. We hope our participant directory can help foster some of those connections and we encourage you to reach out to each other or to the National Center for Family Philanthropy staff if you’d like introductions to your peers.

In preparation for our time together, please:

- Complete the [pre-survey](#), if you have not already, with biographical information to be included in the [participant directory](#) and to help us plan our breakout sessions.
- Visit the event website (passcode: **tei2020**) to view the most up-to-date program and agenda. More information about using the event website is [listed below](#). We encourage you to browse the optional pre-read materials and related resources on the event website.
- Sign up for *Ask the Attorney* and *Ask the Investment Director* one-on-one meetings (offered before and after each day’s sessions). More information about *Ask the Expert* opportunities can be [found here](#).

Lastly, we are grateful to our lead sponsor, [Cambridge Associates](#), for supporting our programming and the sector and of course, to each of you for committing to growing and learning as a community.

In partnership,

A handwritten signature in black ink that reads "Nick Tedesco". The signature is stylized, with the first name "Nick" and last name "Tedesco" clearly legible.

Nick Tedesco
President & CEO
National Center for Family Philanthropy

ACCESSING THE EVENT WEBSITE

The event website is home to the TEI schedule, speakers, resources, and more. Each session will have a unique Zoom login link, available on the event website in the week prior to TEI.

Event Schedule

- The TEI event schedule here: <https://2020trusteeducationinstitute.sched.com/>
- The website is password protected and available for TEI registrants only. The password is **tei2020**.
- You can access the full schedule on your computer browser or other device. It is not necessary to download an app on your phone or tablet.

Links to Access Sessions

- Each session on the agenda has a unique Zoom link. Zoom links will be populated one week prior to the event. Learn more about [tips for using Zoom below](#).

Related Resources and Pre-read Material

- When you click on an individual session, you'll find a session description followed by a list of related resources and speakers. We invite you to explore the resources to further your learning.

Creating a Personalized Schedule

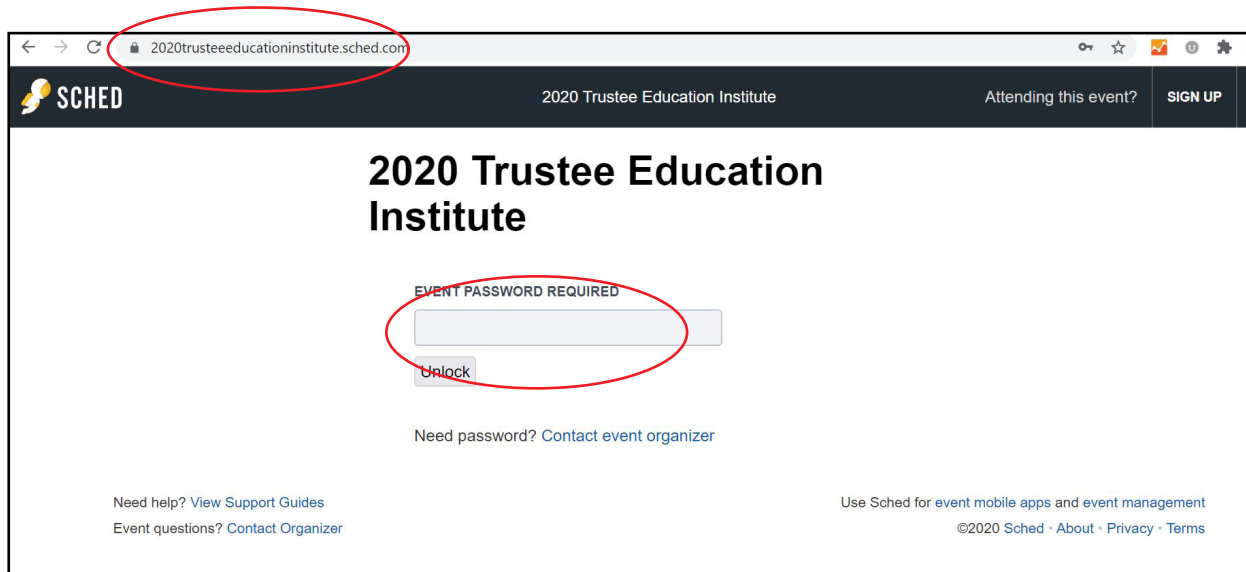
- If you would like to create an individualized schedule (to bookmark sessions and sync with your phone or calendar), you will need to create a Sched.com account and password. This password will be unique to you and is **not** the same as the event website password.
- Creating a personal profile on Sched is optional. To learn more about creating a profile, [see these tutorials](#).

Technical Issues

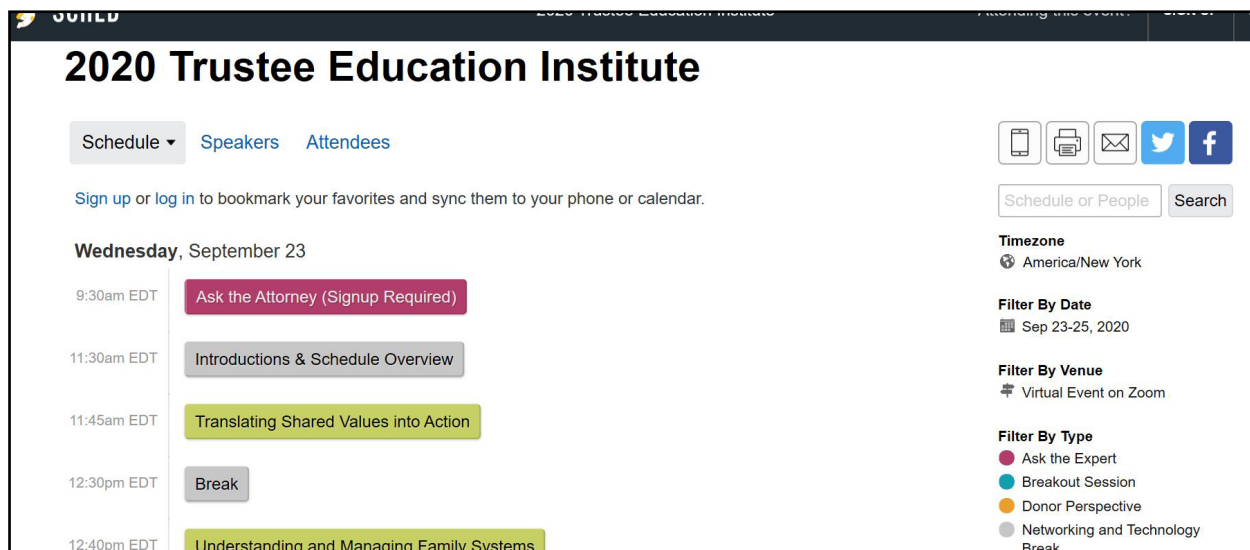
- In the event that you experience issues or have questions about navigating the event website, please email Maggie McGoldrick at maggie@ncfp.org.

NAVIGATING THE EVENT WEBSITE

- Visit <https://2020trusteeducationinstitute.sched.com/> from your web browser.
- Type in the event password: tei2020



- You'll be directed to the full schedule.
- To learn more about an individual session, click on the title.



NAVIGATING THE EVENT WEBSITE

- When you click on an individual session, you'll see the session description followed by a unique Zoom login details for that session. Additionally you can find resources related to the session.

Wednesday, September 23 • 11:45am - 12:30pm

[Back To Schedule](#)

Translating Shared Values into Action

[Sign up or log in](#) to save this to your schedule, view media, leave feedback and see who's attending!

<https://sched.co/ciqX>

[Tweet](#)

[Share](#)

What motivates you and your family to give? Are you called to advance a particular grantmaking mission? Or are you interested in creating an opportunity for family members to come together and strengthen family ties through philanthropy and service to others? Or is it both? Regardless, the ability to work together with other members of your family to translate values into action is fundamental to your success. In this session, participants will hear stories of multigenerational families and personal perspectives on family values, evolving mission and community needs, and family engagement.

Join the session with the Zoom link: <https://us02web.zoom.us/j/85712842303> and Webinar ID: 857 1284 2303

Related Resources:

- [Core Values of a Splendid Legacy](#) by Sarah Jane Cavanaugh (Chapter 1 of *Splendid Legacy 2: Creating and Re-Creating Your Family Foundation*)
- [Money and Values](#), NCFP Content Collection

USING ZOOM FOR VIRTUAL TEI

We will be using Zoom as our technology platform for TEI. Most plenary sessions will be broadcasted as webinars, and attendees will be in “listen only” mode (no audio or video capabilities). Attendees can ask questions through the Q&A function at the bottom of the screen.

For most breakout sessions, you will be in a Zoom meeting room. We invite all participants to join by video camera in the breakout sessions for engaging discussions with your peers. To help minimize background noise, all participants will enter Zoom meeting rooms muted, and to ask a question or participate in the conversation you will simply need to unmute yourself via the Zoom controls in the lower-left-hand corner of your screen.

Zoom Technology Tips

- To access our virtual TEI sessions, click on the Zoom link shared on the event website for each session. Every session will have a unique Zoom link and Meeting ID.
- You can connect to Zoom through your computer, phone, or other device. We suggest using your computer for optimal viewing.
- Attendees can call-in for audio using the phone numbers provided, or can connect through computer audio. For breakout sessions, have access to a video camera (if possible).
- Issues with internet connectivity and computer glitches happen. If you accidentally disconnect from Zoom, try to reconnect to the system through the Zoom link provided. If you continue to have connectivity issues, you can call in for audio only through the phone number and Meeting ID provided for the session.

Technical Difficulties

If you experience technical difficulties or need assistance accessing the Zoom platform, email jen@ncfp.org.

ASK THE EXPERT SIGNUPS

[Andras Kosaras](#), Counsel at Arnold & Porter, and [Paul Liu](#), Managing Director at Cambridge Associates, are each generously hosting one-on-one meetings to answer your legal and investment questions. These 20-minute optional meetings will be available before and after the regular TEI programming and must be registered for separately.

Sign Up

- *Ask the Attorney* signups are available [here](#). *Ask the Investment Director* signups are available [here](#). All times are Eastern.
- If you are attending TEI with others from your foundation, you're welcome to attend an Ask the Expert meeting together.
- Registrants will receive a calendar invitation with Zoom information prior to their meeting.
- Note: you do not need to create a Signup Genius account to signup.

Technical Difficulties

In the event that you experience issues or have questions about Ask the Expert registration, please email Maggie McGoldrick at maggie@ncfp.org.

FAMILY DISCUSSION GUIDE

This discussion guide is for families and boards who send attendees to the 2020 Trustee Education Institute. We recommend that you set up a 30-45 minute debriefing call in the weeks following the Institute to discuss these questions with one another. If only one board member attends the Institute, they may use these questions to guide a presentation for the full board. If the foundation sends multiple leaders to the Institute, these questions can help stimulate discussions about what each participant took away from the Institute, and to help you turn those collective learnings into specific actions to take forward in your work.

Note: We recommend that you share these questions in advance of your scheduled debrief call to allow individuals time to reflect and come to the discussion with specific ideas and suggestions.

Who was your favorite/most compelling presenter at the Institute? What specific message(s) or insight(s) did they share that were of most interest to you? Were there any comments from other speakers that really resonated with you?

What did you hear that was surprising to you? Were there any speakers or messages that you disagreed with?

What are three things you as an individual board (or prospective board) member will do over the next three months to build on what you learned at the Trustee Education Institute?

What is one way your foundation could change or adapt its current practices in the areas of governance, grantmaking, or family relationships based on what you heard at the Institute? How would this help your giving? Who can make this change happen?

PARTICIPANT DIRECTORY

as of 9/23/20

Attendees are encouraged to connect with one another and continue these conversations beyond TEI! If you would like your full contact details to be listed, be sure to complete [this survey](#). The survey also asks questions on issue areas and expertise so you can connect with similar funders.

Please use contact details appropriately and with discretion. Sharing this participant directory with others is not permitted. If you have questions or changes, please email maggie@ncfp.org.

DAVID ACKER

Director
Acker Family Philanthropy Group
New York, NY

JULIAN ACKER

Julian@imagineholdingsllc.com

Member
Acker Family Philanthropy Group
New York, NY

Issue areas: Education; Health; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Monitoring and evaluation; Next-gen engagement; Succession and legacy

The Acker Family Philanthropy Group is built on the entrepreneurial drive and the spirit of humility and integrity. It is our responsibility to provide opportunities for others and help shape the future of each community we support.

Our approach is an active one, in which we support organizations and causes beyond just a financial commitment.

LYNN ANDERSON

Director
The LuLu Foundation
Minneapolis, MN

ROGER BAIRSTOW

Executive Director
[Jubilee Foundation](#)
Pasco, WA

Issue areas: Community development

Topics of interest: Impact investing



PAUL BELSITO

pbelsito@davisfdn.org

Executive Director

[Irene E. and George A. Davis Foundation](#)

Springfield, MA

Issue areas: Education; Environment and/or climate change; Racial and social justice

Topics of interest: Funder collaboration; Impact investing; Next-gen engagement

ANNA BLANDING

Trustee

[William Caspar Graustein Memorial Fund](#)

Hamden, CT

LESLIE BORIS

Trustee

Dexter F. and Dorothy H. Baker Foundation

Allentown, PA



CHARLES BROWN

csbrownjr1950@gmail.com

Trustee

Charles S. and Millicent P. Brown Family Foundation

Williamsburg, VA

Issue areas: Education; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Next-gen engagement; Succession and legacy

Mr. Brown is the retired Chief Administrative Officer and Senior Vice President of the Eastman Kodak Company (Retired July 2006). He served as the inaugural Director of the Rochester Area Colleges Center for Excellence in Math and Science, from February, 2007 until January 2011. He subsequently served as a consultant for the Executive Service Corp of the Triangle providing business processes and leadership advice to non-profits in the North Carolina Research Triangle. He continues as a member of the Rochester Institute of Technology (RIT) Board of Trustees. He holds a BS and a Master of Engineering degree in Chemical Engineering from Cornell University. In addition he holds a MBA from RIT and received a MS in Management as a Fellow at MIT's Sloan School of Management. He and his wife, Renee, reside in Pittsboro, NC.

JEAN BUCKLEY

jbuckley@tracyfoundation.org

Board President

[Tracy Family Foundation](#)

Mt. Sterling, IL

Topics of interest: Board composition and governance; Identity and values; Next-gen engagement; Succession and legacy; Trust-based philanthropy

Jean is the President of the Tracy Family Foundation. She has served in this position since 1997 through present day. Jean is a second-generation Tracy family member. The 125 members of the Tracy family spans 3 generations ranging in ages from 4 months to 70 years. The Tracy Family Foundation is funded by the family business Dot Foods. Some of her prior board experience includes serving on the Dot Foods Board of Directors, the Tracy Family Council, and the Community Foundation of the Quincy Area. Jean is a current board member and past Chair of Exponent Philanthropy. Jean and her husband have 4 children, 2 daughters-in-law, 2 sons-in-law, and 8 grandchildren.

MARTY HOFFMAN BYERS

President

The Barry Foundation

Fargo, ND

GABBY CALLAWAY

Board Member

[Fuller E. Callaway Foundation, Inc.](#)

LaGrange, GA

MARIAN CASEY

Trustee

[The Powell Foundation](#)

Houston, TX

KELLY CHANG

kmc@renchefoundation.org

President

[Ren Che Foundation](#)

Seattle, WA

Issue areas: Education; Environment and/or climate change; Health; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Funder collaboration; Feedback and listening practices; Strategic lifespan (spending down)

ELIZABETH MCCOY CHEN

elizabethmccoychen@gmail.com

Executive Director and Trustee

Bowen H. & Janice Arthur McCoy Charitable Foundation

Glendale, CA

Topics of interest: Board composition and governance; Effective grantmaking; Monitoring and evaluation

SARAH CLEVELAND

Trustee

[The Russell Family Foundation](#)

Gig Harbor, WA

LUCAS CODOGNOLLA

Lucas.codognolla@gmail.com

Trustee

[William Caspar Graustein Memorial Fund](#)

Hamden, CT

Issue areas: Advocacy and public affairs; Education; Immigration; Racial and social justice

Topics of interest: Impact investing; Next-gen engagement; Systems change

**LAUREN COLLINS**

laurencollins0220@gmail.com

Board Chair

[Emily Hall Tremain Foundation](#)

New Haven, CT

Issue areas: Arts; Education; Environment and/or climate change

Topics of interest: Next-gen engagement; Succession and legacy

CLAREN COPP-LAROCQUE

Committee Member

Panoram Foundation

Dubois, WY

JON DAVIS

Founder/Board Chair

Davis Family Charitable Foundation

Boston, MA

PALMER DEPETRO

Board Member

[Emily Hall Tremain Foundation](#)

New Haven, CT

KEITH DUBOIS

kdubois@cox.net

Lead Trustee

Charles S. and Millicent P. Brown Family Foundation

Williamsburg, VA

Issue areas: Education; Health; Human services; Racial and social justice

Topics of interest: Board composition and governance; Diversity, equity, and inclusion; Effective grantmaking; Next-gen engagement; Strategic lifespan (spending down); Succession and legacy

**PRISCILLA ENRIQUEZ**

priscilla@jbmcclatchyfoundation.org

Chief Executive Officer

[James B. McClatchy Foundation](#)

Sacramento, CA

Issue areas: Advocacy and public affairs; Arts; Communications and media; Education; Environment and/or climate change; Health; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Board composition and governance; Capacity building; Diversity, equity, and inclusion; Funder collaboration; Impact investing; Monitoring and evaluation; Staff and operations; Strategic lifespan (spending down); Succession and legacy; Systems change; Trust-based philanthropy

As an entrepreneurial grantmaker with over 20 years of experience, Priscilla Enriquez's past work has supported communities along many pathways leading to transformed lives and communities. Whether by achieving college attainment, exploring the creative and cultural economy, addressing the digital divide in remote communities, or accessing inclusive health care, Priscilla has led with community and impact in mind. Right now, Priscilla is devoted to California's Central Valley by converging the needs of English Learners and protecting the First Amendment freedoms of speech and expression, and a free press. Priscilla is a leader dedicated to rigor, inspiring diverse teams to think and deliver strategically, while respecting those who have entrusted us with their philanthropic reins to drive change, equity, and inclusion.

LUCAS ERICKSON

Executive Director

The LuLu Foundation

Minneapolis, MN

Issue areas: Advocacy and public affairs; Arts; Education; Environment and/or climate change; Gender equality; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Identity and values; Impact investing; Monitoring and evaluation; Place-based giving

NICOLE GALLAGHER

Board Intern

[Conrad N. Hilton Foundation](#)

Westlake Village, CA

ELLEN BAKER GHELARDI

Trustee and Secretary

Dexter F. and Dorothy H. Baker Foundation

Allentown, PA

PHYLLIS RAWLS GOFF

phyllisgoff@icloud.com

Trustee

[McKnight Foundation](#)

Minneapolis, MN

Issue areas: Racial and social justice; Environment and/or climate change

Topics of interest: Board composition and governance; Diversity, equity, and inclusion; Impact investing; Succession and legacy

DOTTIE GROVER

Estes Family Foundation

Charlottesville, VA



LINDA HANAUER

lhanauer@ridgeleighmgt.com

Co-President

[Kettering Family Foundation](#)

Dayton, OH

Topics of interest: Board composition and governance; Identity and values; Impact investing; Next-gen engagement; Succession and legacy

Linda Hanauer joined the Kettering Family in 2020 as CEO of its Family Office to work with both its for profit and philanthropic entities. She is a strategic business and financial executive skilled at managing multiple initiatives in fast-paced environments and developing solutions for complex business issues.

Linda held numerous leadership positions during her prior twenty years in the private equity/venture capital industry, including Managing Director, Chief Financial and Chief Compliance Officer of Millroad Capital Management, Chief Operating Officer of Paine SchwartzPartners, Chief Financial and Chief Administrative Officer of Venrock, Chief Operating Officer of AEA Investors and Chief Financial and Chief Administrative Officer of the Private Equity Division of Credit Suisse. Prior to embarking on her roles in private equity and venture, Linda was a Director and Assistant Treasurer at First Boston and a Senior Member of one of the transformation teams responsible for the integration of Credit Suisse and First Boston. Prior to joining First Boston, she was a Vice President in Corporate Finance at Drexel Burnham Lambert.

Linda is an Emeritus Director and a Founding Member of the Private Equity CFO Association, NY Chapter and serves on the Board of Directors of CityStep Org Inc. She has an MBA from the Harvard Business School and a BA in Spanish, summa cum laude from Adelphi University.

JENNIFER HERMAN

Trustee

[Carl and Ruth Shapiro Family Foundation](#)

Boston, MA



CAITLIN HILTON

caitlin.hilton@stcl.edu

Generations in Giving Member

[Conrad N. Hilton Foundation](#)

Westlake Village, CA

Issue areas: Communications and media; Education; Environment and/or climate change; Gender equality; Health; Housing and homelessness; Immigration; International; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Feedback and listening practices; Impact investing; Monitoring and evaluation; Next-gen engagement; Social entrepreneurship; Succession and legacy

DAN HILTON

Past Board Intern and GIG Advisory Council Chair

[Conrad N. Hilton Foundation](#)

Westlake Village, CA

CAROLINE HOCH

Board Member

The Ajana Foundation

Chestnut Hill, MA

AMANDA HUGHES

Director

[The Friedkin Foundation](#)

Houston, TX

DEBORAH IARUSSI

Debsills67@yahoo.com

Trustee and Program Officer

[Sills Family Foundation](#)

Boston, MA

Issue areas: Arts; Criminal justice reform; Environment and/or climate change; Gender equality; Human services; Racial and social justice

Topics of interest: Funder collaboration; Impact investing; Next-gen engagement

ELLEN JAFFE

Trustee

[Carl and Ruth Shapiro Family Foundation](#)

Boston, MA

TERRY JENKINS

Program Manager

[Tracy Family Foundation](#)

Mt. Sterling, IL

**BILL KEE**

keewg64@gmail.com

Trustee

[The Arthur Vining Davis Foundations](#)

Ponte Vedra Beach, FL

Bill is a retired psychologist. He is involved in a number of volunteer organizations:

1. Trustee of the Arthur Vining Davis Foundations
2. Board Member of Arm-in-Arm, a non-partisan group focused on responsible gun ownership in South Carolina
3. Conservation Council of South Carolina Audubon

Issue areas: Education; Environment and/or climate change; Interfaith tolerance; Racial and social justice; Religion

Topics of interest: Capacity building; Effective grantmaking; Funder collaboration; Next-gen engagement

EMILY KLASS

emilyklass@gmail.com

Board Member

[**Andrus Family Fund**](#)

New York, NY

Issue areas: Arts; Environment and/or climate change; Racial and social justice

Topics of interest: Board composition and governance; Capacity building; Diversity, equity, and inclusion; Effective grantmaking; Feedback and listening practices; Funder collaboration; Identity and values; Strategic lifespan (spending down); Systems change; Trust-based philanthropy

**MICHELLE KNAPIK**

knapik@tremainefoundation.org

President

[**Emily Hall Tremain Foundation**](#)

New Haven, CT

Issue areas: Arts; Early literacy; Education; Educational technology; Environment and/or climate change; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Feedback and listening practices; Impact investing; Next-gen engagement;

Systems change; Trust-based philanthropy

Michelle Knapik is the president of the Emily Hall Tremain Foundation (EHTF). EHTF funds innovative projects that advance solutions to basic and enduring problems in the fields of arts, environment, and learning differences. Key initiatives include Artists Thr!ve, Sustainable CT, and an Early Learning Ecosystem.

Prior to EHTF, Michelle was the Director of the Sustainable Environments Program at the Surdna Foundation where she developed grantmaking and PRI strategies to advance Next Generation Infrastructure. Previously, Michelle was the Environment Program Director at the Geraldine R. Dodge Foundation where she led strategies to support sustainable community solutions.

Michelle draws on a wide range of program, policy, and organizational development experience. A lawyer by training, Michelle worked for eleven years in Philadelphia City government, including serving as the Director of Energy Policy. In this role she helped the City complete its first green buildings and worked on a range of green building initiatives, transportation alternatives, cross-agency sustainable development projects, and low-wealth community energy strategies.

From the frontline, grassroots activism of Greenpeace to the US Navy to local government to philanthropy, service is a through-line in Michelle's professional journey. She has also served on nonprofit boards, in civic leadership positions, and she is currently active in numerous philanthropic affinity groups. Michelle has deep, contemplative and spiritual practices and she centers justice, equity and peace in individual, organizational, and movement level development and healing. She and her wife live in Westchester County, NY, and she has four amazing step-daughters.



LAURIE LATHAM

llatham@ecksteincharity.org

Executive Director

[Ray and Kay Eckstein Charitable Trust](#)

Paducah, KY

Issue areas: Human services; Religion

KATHERINE LUCAS

katherinelucas.atcf@gmail.com

Director

Alisann and Terry Collins Foundation

Springfield, VA

Issue areas: Education; Environment and/or climate change; Health; Housing and homelessness

Topics of interest: Effective grantmaking; Feedback and listening practices; Impact investing; Next-gen engagement; Place-based giving

MOLLY MACLEOD

molly@davisfamilycf.org

Program Officer

Davis Family Charitable Foundation

Boston, MA



ALEXIS MARION

alexis@fcfox.org

Trustee and Program Officer

[Frieda C. Fox Family Foundation](#)

Studio City, CA

Issue areas: Education; Gender equality; Housing and homelessness; Racial and social justice; Youth

Topics of interest: Effective grantmaking; feedback and listening practices; Next-gen engagement; Strategic lifespan (spending down)

Alexis, in addition to being a trustee, is the Program Officer and Junior Board Advisor for the Frieda C. Fox Family Foundation. In her role, she oversees the day-to-day grant administration and guides the Junior Board members (ages 8-21) in their grantmaking. Alexis considers her journey in philanthropy much like that of the delta symbol Δ : 3-sided and focused on change. She has been a recipient of philanthropic funds during her years as a foster youth in Los Angeles, a grant-seeker as a nonprofit employee, and now a grantmaker whose passion is to support young people in making a difference

through philanthropy. Alexis sees philanthropy as a privilege, and works toward creating a grantmaking culture that is brave, empowering, and focused on the liberation of all people. Alexis received her M.A. in Nonprofit Management from Antioch University, LA and is a 21/64 Certified Advisor. If you want to see her face light up, just ask her why play-doh and pipe cleaners are required meeting supplies!



MICHELLE MATHILE

mlmathile@ddhhome.com

Trustee

[**Mathile Family Foundation**](#)

Dayton, OH

Issue areas: Advocacy and public affairs; Education; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Board composition and governance; Capacity building; Diversity, equity, and inclusion; Effective grantmaking;

Funder collaboration; Identity and values; Impact investing; Next-gen engagement; Place-based giving; Social entrepreneurship; Succession and legacy; Systems change

Michelle Mathile is a native of Dayton, Ohio and actively serves in her community. Her passions include empowering single mothers and bridging the social divide through awareness and education. Michelle has also traveled numerous times to Guatemala where she works to provide better opportunities for impoverished children.

Michelle is the Vice-Chairwoman of The Glen at St. Joseph, a life-changing campus for single mothers with young children based in Dayton, Ohio. She has been especially involved in the Bridges Out of Poverty work at the Glen and serves on the Bridges Steering Committee. The committee provides resources, tools and support to bring awareness and solutions that bridge the poverty gap in the community.

Michelle is also a member of the Board of Trustees of the Mathile Family Foundation, which serves children and families in need through the Dayton region by providing grants to organizations whose programs align with the Foundations' mission and focus. Michelle graduated from the University of Dayton with a Bachelor of Science in Sociology where she is also a member of the Board of Trustees.

Michelle also has a passion for woodworking and has been producing pieces of furniture. Michelle and her husband, Mike met in high school and have been married for almost 30 years. Together, they have four children and reside in the Dayton region.

SUSAN MCCLATCHY

Vice Chair

[**James B. McClatchy Foundation**](#)

Sacramento, CA



PETER MILLER

pmiller@mfi.org

President and CEO
The Meadows Foundation
Dallas, TX

Issue areas: Arts; Education; Environment and/or climate change; Gender equality; Health; Housing and homelessness; Human services; Racial and social justice; Science

Topics of interest: Board composition and governance; Effective grantmaking; Funder collaboration; Impact investing; Next-gen engagement; Succession and legacy

Peter Miller is president and CEO of The Meadows Foundation, one of the largest private philanthropies in Texas. He is a great-nephew of founders Algur H. and Virginia Meadows. He also serves on the Meadows Museum Advisory Board and the Meadows School of the Arts Executive Board at Southern Methodist University.

He brings a strong background in financial services to the Foundation. Most recently, he was senior vice president of private wealth management at Robert W. Baird, an employee-owned wealth and asset management, capital markets, and private equity firm.

Previously, Peter was president of the advisor development group at Wells Fargo Advisors and president of the financial services group at Wachovia Securities. He also served in multiple leadership roles at A.G. Edwards & Sons and Kidder, Peabody and Co.

In addition to serving The Meadows Foundation as a director and trustee for seven years and as a member of the investment committee for 10 years, Mr. Miller is co-founder Sons & Daughters of Souard in St. Louis, which encourages local businesses to help individuals experiencing homelessness. Sons & Daughters members raise funds and volunteer for Peter & Paul Community Services, which provides housing and supportive services to homeless men and women, especially those who live with mental illness or HIV.

Peter was also a donor and volunteer at Souard School, and a previous board member of St. Louis Symphony, St. Louis Red Cross, and Old Newsboys Day, a charitable project of the St. Louis Post-Dispatch. He holds a Bachelor of Arts in psychology from Hobart and William Smith Colleges. Mr. Miller is married and has two daughters and three grandchildren.

ANNE MOLLOY

ammolloy@mac.com

Trustee

[Posner Foundation of Pittsburgh](#)

Pittsburgh, PA

Issue areas: Education; Human services; International

Topics of interest: Board composition and governance; Effective grantmaking; Funder collaboration; Impact investing; Next-gen engagement; Strategic lifespan (spending down)

**KARA MOUNTCASTLE**

kara.o.mountcastle@gmail.com

Trustee

[Mary Reynolds Babcock Foundation](#)

Winston-Salem, NC

Issue areas: Advocacy and public affairs; Gender equality; Environment and/or climate change; Racial and social justice;

COURTENAY NEEDHAM

Family Member

Charles S. and Millicent P. Brown Family Foundation

Williamsburg, VA

**ELIZABETH NEWTON**

enewton@crown-chicago.com

Director of Family Engagement

[Crown Family Philanthropies](#)

Chicago, IL

Topics of interest: Board composition and governance; Next-gen engagement; Social entrepreneurship

Elizabeth is the Director of Family Engagement at Crown Family Philanthropies. She oversees the strategic development and execution of experiences that facilitate the Crown family's participation in significant and compelling philanthropic work. Elizabeth and her team work alongside family members to support their ongoing engagement with their family's long legacy of giving.

Prior to her work with CFP, Elizabeth founded Allow Good, a social purpose organization with a mission of empowering youth through philanthropy to take meaningful action in the world. Elizabeth worked for nearly a decade at the Stanford Graduate School of Business delivering social impact and global experiences for MBA students. She has also served as adjunct faculty at Northwestern University's School of Education and Social Policy.

TERRILL NORTH

tnorth@hoffberger.org

Executive Director

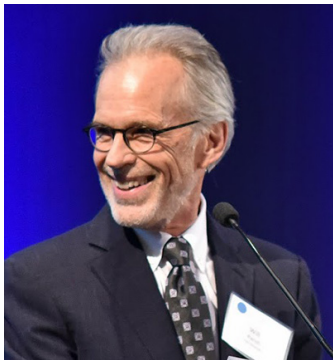
[Hoffberger Family Philanthropies](#)

Baltimore, MD

Issue areas: Health; Human services; Racial and social justice

Topics of interest: Funder collaboration; Place-based giving

Terrill North is Executive Director of the Hoffberger Family Philanthropies, which focus on children's mental health and workforce development in Baltimore, Maryland. He formerly led the Montgomery County Collaboration Council for Children, Youth, and Families. Additionally, Terrill has served as a management consultant with Deloitte Consulting and Booz Allen Hamilton and previously served as a senior advisor to two Members of Congress. Terrill holds a Juris Doctorate from Columbia University and Master of Education from the Broad Center for Management of Urban School Systems. He completed his undergraduate studies at Howard University.



WILL PARISH

will@wattif.org

Founder

Parish Family Fund

San Francisco, CA

Issue areas: Advocacy and public affairs; Education; Environment and/or climate change

Topics of interest: Diversity, equity, and inclusion; Funder collaboration; Next-gen engagement; Social entrepreneurship

The Parish Family Fund concentrates in the areas of environment, education, social and environmental justice, international relief, and nuclear disarmament. The Fund is located in San Francisco, and the majority of funding occurs in California. The Parishes have practiced philanthropy for over thirty years, and the next generation is becoming involved in the decision making. The Parishes will be pursuing strategic planning in 2021.



TRIPP PENN

tpenn@callawayfoundation.org

President

[Fuller E. Callaway Foundation](#)

LaGrange, GA

Issue areas: Education; Housing and homelessness

Topics of interest: Capacity building; Diversity, equity, and inclusion; Effective grantmaking; Impact investing; Next-gen engagement; Place-based giving

Paul S. "Tripp" Penn III currently serves as President of the Callaway Foundation, Inc. Penn graduated from the University of Georgia (BA, Med) and has an MBA degree from

LaGrange College in 2003. Penn previously served as the Chief Executive Officer at Upson Regional Medical Center in Thomaston, Georgia. Prior to that, he was employed at West Georgia Health, first as director of development and then as vice president of support services.

Penn has extensive community service, including LaGrange College Board of Trustees, president of LaGrange College Leadership Council and Leadership Georgia Board of Trustees.

A member of LaGrange First United Methodist Church, he has served as chairman of the church council, chairman of the missions committee and Sunday school class president. Tripp and his wife, Megan, have three children.

LESLIE PERKUL

lperkul@oneill-foundation.org

President and CEO

[**William J. and Dorothy K. O'Neill Foundation**](#)

Cleveland, OH

Issue areas: Education; Housing and homelessness; Human services

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Feedback and listening practices; Funder collaboration; Monitoring and evaluation; Next-gen engagement; Place-based giving; Systems change; Trust-based philanthropy



JULIA PETTENGILL

julia@schoonerfoundation.org

Executive Director

[**Schooner Foundation**](#)

Boston, MA

Issue areas: Capacity building; Education; Environment and/or climate change; Health; Racial and social justice; Gender equality; International

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Funder collaboration; Feedback and listening practices; Monitoring and evaluation; Next-gen engagement; Staff and operations; Systems change; Trust-based philanthropy

Julia joined the Schooner Foundation in 2018 as Executive Director and oversees the vision and execution of the Foundation's strategy and grant making activities, domestically and internationally. In her role, Julia seeks to advance the Foundation's human rights focus by leveraging funds where there is the greatest need and opportunity. Previously, Julia served as Executive Director at African Food and Peace Foundation (AFPF). Prior to her work at AFPF, Julia consulted for the German Corporation for International Cooperation (GIZ), and held positions at the Massachusetts Society for the Prevention of Cruelty to Children and the Education Development Center. She holds a Bachelor of Arts and Master of Education from the University of Cape Town, South Africa. Julia currently serves as an Advisor to a number of non profit organizations, and as a

member of the National Cancer Institute's Pediatric Leukemia and Lymphoma Steering Committee.



ELIZABETH CARLOCK PHILLIPS

Executive Director

[Phillips Foundation](#)

Greensboro, NC

Elizabeth Carlock Phillips is a social entrepreneur and impact investor at the helm of Phillips Philanthropies, which includes the Phillips Foundation. Since 2013, she has led the Foundation's implementation of Generational Grants, Original Programs, and Impact Investing, including a "Total Portfolio Activation"

approach. Elizabeth serves as a Governor-appointed Trustee of UNC Greensboro and is on the boards of Texas Women's Foundation, The Dallas Foundation, and Women Moving Millions, along with other affiliations. She has appeared in featured stories on broadcast news and other media including *Barron's*, *Bloomberg*, *Dallas Morning News*, *Forbes.com*, *The Financial Times*, and *Triad Business Journal*. Elizabeth and her husband Kevin are cofounders of The ImPact and principals of Phillips Enterprises, a family office and portfolio of companies. They enjoy life with their young family in Dallas, Texas, and Greensboro, North Carolina.

JOHN PUTNAM

President

[National Christian Foundation](#)

Charlotte, NC



MARIE QUEEN

mariequeen5@gmail.com

Director

James J. and Sue Femino Foundation

Pasadena, CA

Issue areas: Education; Housing and homelessness

Topics of interest: Board composition and governance; Next-gen engagement; Succession and legacy

After graduating from Wellesley College, Marie worked for The Capital Group Companies. She specialized in marketing fixed-income mutual funds before leaving to pursue an MBA at Northwestern University.

With an MBA in Finance & Marketing, Marie returned to Southern California and joined Nestlé USA. She worked in brand management and consumer product marketing for six years before taking time off to raise three children. Marie has been active in many community organizations, including serving on the Boards of Union Station Homeless Services, Polytechnic School, and the Wellesley Club of Pasadena.

Since 2008, Marie has been a Director of her family's foundation, The James J. and Sue Femino Foundation. Marie has been an active member of The Center on Philanthropy and Public Policy at the University of Southern California, contributing to their work with Donors and their Families in the Los Angeles area. She recently joined The Center's Board of Directors.

Marie is married to John Queen, a Vice President and Fixed Income Portfolio Manager at Capital Research and Management Company. Marie and John's children are now young adults – two are college students, and the eldest is a recent college graduate.



ELIZA KEMPNER QUIGLEY

ekquigley@kempnerfund.org

President

[Harris and Eliza Kempner Fund](#)

Galveston, TX

Eliza Quigley has more than a decade as a senior leader within nonprofits, charitable foundations, and social service organizations with a deep understanding and expertise in program development and donor relations. Eliza is currently the President of the Harris &

Eliza Kempner Fund, having served on the Board of Directors for 14 years in various roles before becoming the first of her generation to lead her family's philanthropic endeavors into the sixth and seventh generations. As President of the Board, she oversees a 50 million corpus and the 2.7 million annual grant allocations.

Eliza has a Master's Degree in Social Work from the University of Texas at Austin and a Bachelor of Arts in Art History from Boston University. While at the University of Texas School of Social Work, she specialized in Administration and Planning, and studied at the RGK Center for Philanthropy and Community Service. In addition, she is certified in Alcohol and Drug Counseling Skills by the University of California, Los Angeles. She also holds a certification in Fine & Decorative Arts from Christie's Auctioneers & the Royal Society of Arts in London and worked for a private art dealer in New York and for Sotheby's Auctioneers in Los Angeles.

Eliza sits on various boards as a trustee and as an advisor to the following organizations: The National Center for Family Philanthropy, The University of Texas Medical Branch School of Nursing, The Galveston Roundtable of Foundations, The Galveston County Recovery Fund, The Johnny Mitchell Branch of the Boys & Girls Club, Temple B'Nai Israel and is a lifetime Trustee of the Harry Rosenberg Library.



ELIZABETH RAMIREZ

eramirez@wppg.org

Interim Director
Walton Personal Philanthropy Group
Bentonville, AR

Elizabeth Ramirez leads the Walton Personal Philanthropy Group, which provides services to the family of Sam and Helen Walton to support their individual philanthropic activities.

Prior to her current role, Elizabeth was a senior director at Arabella Advisors where she partnered with institutional, individual, and corporate funders to structure and operationalize innovative models to achieve their philanthropic goals. She previously worked at the Levi Strauss Foundation, where she contributed to the foundation's signature hometown leadership development and capacity-building initiative. Elizabeth began her career in the executive office of the United Nations Foundation.



ELIZABETH RHEE

elizabethcrhee@theheraldgroup.com

Family Advisory Committee Member
[Patrick P. Lee Foundation](#)
Williamsville, NY

Issue areas: Advocacy and public affairs; Communications and media; Education; Housing and homelessness

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Funder collaboration; Impact investing; Next-gen

engagement; Place-based giving; Social entrepreneurship; Succession and legacy; Trust-based philanthropy



CHARLOTTE ROBINS

Char.robins93@gmail.com

Junior Board Member
[Robins Foundation](#)
Richmond, VA

Issue areas: Advocacy and public affairs; Communications and media; Gender equality; Housing and homelessness; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Effective grantmaking; Next-gen engagement

LISA ROSENBLOOM

admin@greeheyfoundation.org

Board Member

[Greehey Family Foundation](#)

San Antonio, TX

Issue areas: Children's issues; Education; Health; Housing and homelessness

Topics of interest: Board composition and governance; Family dynamics; Next-gen engagement; Succession and legacy

SUSAN ROYAL

Susanbroyal@gmail.com

Trustee

Dexter F. and Dorothy H. Baker Foundation

Allentown, PA

Issue areas: Advocacy and public affairs; Arts; Education; Housing and homelessness

Topics of interest: Effective grantmaking; Funder collaboration; Impact investing; Next-gen engagement

DAVID RURIK

G3 Family Member

[The Russell Family Foundation](#)

Gig Harbor, WA

DION RURIK

Board Member

[The Russell Family Foundation](#)

drurik@gmail.com

Gig Harbor, WA

Issue areas: Education; Environment and/or climate change; Housing and homelessness; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Systems change; Trust-based philanthropy

Dion Rurik is a community volunteer and board member with several local nonprofits. She is a founding board member of The Russell Family Foundation, past board president, and chair of the Jane's Fund Committee.



ANGIE SCHLATER

angie.schlater@tracyfoundation.org

Program Manager

[Tracy Family Foundation](#)

Mt. Sterling, IL

Issue areas: Education

Topics of interest: Next-gen engagement

COURTNEY SCOTT

Program Director and Board Chair
Foundation for Community Vitality
Billings, MT

**LEAH ROZENFELD SILLS**

sillsleah@gmail.com
[Sills Family Foundation](#)
Boston, MA

Issue areas: Arts; Education; Racial and social justice; Refugee issues

Topics of interest: Board composition and governance; Capacity building; Feedback and listening practices; Identity and values

I am a contributing member of the Sills Family Foundation. I also sit on the boards of Family Services Of Westchester, Arts Westchester, Songcatchers and the Sousa Mendes Foundation. I am an avid road biker and hiker and recently have discovered a new passion for trail running. I am a retired school librarian.

**MALAAK MAILKYAR SILLS**

malaakms@gmail.com
Junior Board Member
[Sills Family Foundation](#)
Boston, MA

Issue areas: Environment and/or climate change; Human services; Racial and social justice

Topics of interest: Effective grantmaking; Monitoring and evaluation; Next-gen engagement; Systems change

ERICA SHIELDS

Managing Director
[Phillips Foundation](#)
Greensboro, NC

**KATHLEEN SIMPSON**

kathleen@trff.org
CFO & Interim CEO
[The Russell Family Foundation](#)
Gig Harbor, WA

Issue areas: Environment and/or climate change; Housing and homelessness; Racial and social justice

Topics of interest: Board composition and governance; Diversity,

equity, and inclusion; Effective grantmaking; Funder collaboration; Identity and values; Impact investing; Next-gen engagement; Place-based giving; Staff and operations; Succession and legacy; Systems change

Kathleen is the Interim Chief Executive Officer and Chief Financial Officer of The Russell Family Foundation, where she collaborates with the board to guide the Foundation's strategic planning, programs and community affairs, and oversees the Foundation's impact investing, finance, risk management, information technology and operations. She has extensive experience with both for-profit and nonprofit development, and the financial advising of many entities, including deep involvement in operations. Prior to joining the Foundation, she was Director of Finance for an independent wealth management firm serving individuals, multigenerational families and foundations. She also founded and operated a public accounting firm providing CFO services to businesses, high-net-worth individuals and non-profits for more than a decade. Kathleen is a certified public accountant and holds a Master of Business Administration degree. She is a member of the American Institute of Certified Public Accountants and the Washington State Society of Certified Public Accountants and serves on the board of directors for Confluence Philanthropy.

LAURIE SKIPPER

laurie_skipper@hotmail.com

Founder
New Opportunities Foundation
Glendale, CA

Issue areas: Education; International

Topics of interest: Effective grantmaking; Impact investing; Next-gen engagement; Social entrepreneurship; Succession and legacy

DEBORAH SLOSS

debjonel@yahoo.com

Trustee
[Fleishhacker Foundation](#)
San Francisco, CA

Issue areas: Education; Environment and/or climate change; Gender equality; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Effective grantmaking; Funder collaboration; Identity and values; Impact investing; Place-based giving



TERESA SLOYAN

tsloyan@hydefoundation.org

Executive Director

[Hyde Family Foundation](#)

Memphis, TN

Issue areas: Advocacy and public affairs; Arts; Communications and media; Education; Parks and neighborhoods

Topics of interest: Board composition and governance; Diversity, equity, and inclusion; Effective grantmaking; Funder collaboration;

Impact investing; Next-gen engagement; Place-based giving; Staff and operations; Succession and legacy

Teresa is president of Hyde Family Foundation, a place-based philanthropic organization created to positively contribute to the growth and development of Memphis. The Foundation focuses on four distinct areas of influence: high-quality education, vibrant spaces and communities, thriving arts and culture and engaged leadership and civic pride. As president, Teresa is responsible for directing the organization's philanthropic agenda, its grant-making budget and its public and private partnerships.

Teresa previously served as director of community relations and corporate giving for AutoZone, Inc., the nation's largest auto parts retailer. Prior to that role, Teresa spent nine years as director of human services and community relations for the Mayor of Memphis, where she managed the city's charitable giving and human services, as well as its community and neighborhood relations.

A Memphis native, Teresa earned her baccalaureate degree from the University of Memphis, then went on to pursue graduate work at the University of Tennessee in Knoxville. In addition to her responsibilities with the Foundation, Teresa is active in a number of Memphis cultural and civic initiatives. In 2009, Teresa was appointed to the ninth district seat on the Tennessee State Board of Education, where she remained for more than five years. She currently serves on the boards of the State Collaborative on Reforming Education (SCORE), Catholic Memphis Urban Schools Trust, Compass Community Schools, Memphis Education Fund, Memphis Grizzlies Charitable Foundation, Brooks Museum of Art and the Memphis River Parks Partnership.

RACHAEL SNEDDON

Sneddonrachael@gmail.com

Trustee

Marie Lamfrom Charitable Foundation

Wilsonville, OR

Issue areas: Arts; Education; Gender equality; Health; Housing and homelessness; Human services; Racial and social justice

Topics of interest: Board composition and governance; Diversity, equity, and inclusion; Effective grantmaking; Feedback and listening practices; Funder collaboration; Identity and values; Impact investing; Monitoring and evaluation; Next-gen engagement; Place-based giving; Social entrepreneurship; Succession and legacy; Trust-based philanthropy

KYRSTEN SOLCZ

kyrsten.solcz@solczgroup.com

Executive Director

[Solcz Family Foundation](#)

Windsor, ON

Topics of interest: Board composition and governance; Effective grantmaking; Funder collaboration; Identity and values; Monitoring and evaluation; Next-gen engagement; Staff and operations; Succession and legacy



SPARKS

sparks@mastofoundation.org

Executive Director

Masto Foundation

San Francisco, CA

Issue areas: Gender equality; LGBTQ issues; Racial and social justice

Topics of interest: Diversity, equity, and inclusion; Funder collaboration; Identity and values; Impact investing; Social entrepreneurship; Systems change; Trust-based philanthropy

Sparks (she/her) values and is deeply committed to promoting equity in the non-profit and for-profit social impact sectors based on her experience as a queer, multi-racial, next generation, woman in the field of philanthropy. She is currently Executive Director of the Masto Foundation, a US-based family foundation rooted in the Japanese-American community. Prior to taking on leadership of her family's foundation, Sparks worked in philanthropy for 12 years, first as a Program Officer for United Way of the Bay Area and then at the Stuart Foundation (both in San Francisco). In addition, she founded a group called Queer Leaders in Philanthropy, a national network of LGBTQ-identified philanthropic professionals, focused on changing the culture of philanthropy to be more empowering of LGBTQ individuals through advocacy, community building, and supporting sustainable leadership.

For the past nine years, Sparks has served on the Program Committee for Horizons Foundation, the oldest LGBTQ community foundation in the US, and sat on several Horizons Community Issues Grants review panels. She has fundraised and advised the Astraea Lesbian Foundation for Justice, and promoted leadership in family philanthropy and with people of color at Resource Generation, the National Center for Family Philanthropy, AAPIP, and the Council on Foundations.

In addition to volunteering her time, Sparks has lead initiatives to make the field of philanthropy more accessible for young people and members of the LGBTQ community. She founded HYPE (Horizons Young Professionals for Equality), which is now one of the largest networks of young LGBTQ donors in the US, and was a founding member of the Funding Queerly Giving Circle which, over a period of five years after granting out \$1+ million, has fundraised and allocated more money to small-budget LGBTQ nonprofits than any other giving circle in history.

Prior to entering philanthropy, Sparks worked as a clinical social worker for foster care youth in Harlem, New York and received a Bachelor's Degree in Psychology from Vassar College and a Master's Degree in Social Work from UC Berkeley. She splits her time between San Francisco and Seattle, where she recently completed her MBA at the University of Washington.

SUSAN STAMERJOHN

Trustee

[Tracy Family Foundation](#)

Mt. Sterling, IL

HEIDI STOLTE

Co-founder

[Stolte Family Foundation](#)

Seattle, WA

ROBIN STRAWBRIDGE

robinstrawbridge@me.com

Vice President

[Fleishhacker Foundation](#)

San Francisco, CA

ALEX TARIOT

Trustee

[Robins Foundation](#)

Richmond, VA



DAN TEEFEY

dan.teefey@tracyfoundation.org

Executive Director

[Tracy Family Foundation](#)

Mt. Sterling, IL

Issue areas: Education; Human services; Racial and social justice; Religion

Topics of interest: Capacity building; Diversity, equity, and inclusion; Effective grantmaking; Identity and values; Impact investing; Place-based giving; Social entrepreneurship

Dan Teefey has been the Executive Director of the Tracy Family Foundation since July 2017. Teefey grew up in the small town of Mt. Sterling, Illinois (pop. 1900), which is the home of the Tracy Family Foundation's office. He earned his undergraduate degree from the University of Illinois and graduate degrees from Northern Illinois University College of Law and North Park Theological Seminary. Teefey previously worked for a Chicago law

firm and served as the pastor of a church in West Lafayette, IN, for 10 years. He and his wife, Dana, have four children.



NICOLE TELL

ntell@blbb.com

Executive Director
BLBB Charitable
Montgomeryville, PA

Issue areas: Education

Topics of interest: Effective grantmaking; Funder collaboration;
Impact investing; Capacity building; Staff and operations

Nicole joined BLBB Charitable in May 2020, bringing with her more than ten years of leadership in nonprofit fundraising and administration. Nicole works with the BLBB Charitable Board of Directors to develop and implement their strategic vision for the foundation and facilitate the foundation's ability to make meaningful and effectual grants in the community. Nicole also supports BLBB Advisors in its focus on community service and charitable giving.

Prior to joining BLBB Charitable, Nicole was the COO & SVP of Development at Children's Scholarship Fund Philadelphia (CSFP), a K-8th grade scholarship organization serving under-resourced children and families. Prior to CSFP, Nicole was the Director of Donor Relations and Communications at Project HOME, a nationally recognized non-profit organization that seeks to end homelessness and poverty in Philadelphia.

An attorney with a background in commercial litigation, Nicole worked for almost ten years at top-tier law firms in both New York City and Philadelphia, including Pepper Hamilton LLP. Nicole serves as a Judge of Elections in Lower Merion, Montgomery County and previously served on the Board of Directors of The Women's Center of Montgomery County. She earned a B.A. from Vassar College and graduated from Fordham University School of Law, magna cum laude.

Outside of the office, Nicole enjoys cooking and the practice of shinrin-yoku ("forest bathing"). She lives in Lower Merion with her husband and teenage son.

KATHY TENHULA

Trustee
Frechette Family Foundation
Minneapolis, MN



ANNE MARIE TOCKET

amtoccket@posnerfoundation.org

Executive Director

[Posner Foundation of Pittsburgh](#)

Pittsburgh, PA

Topics of interest: Funder collaboration; Next-gen engagement; Strategic lifespan (spending down); Staff and operations; Effective grantmaking

WANDA TRACY

Trustee

[Tracy Family Foundation](#)

Mt. Sterling, IL



KIMBERLY DASHER TRIPP

kimberly@strategyforscale.com

Founder and Principal

[Strategy for Scale](#)

San Francisco, CA

Issue areas: Health; Environment and/or climate change; International

Topics of interest: Funder collaboration; Systems change

Kimberly is an independent consultant working with donors and doers on philanthropic strategy. She conducts research on the practices and behaviors of philanthropists; acts as a strategic philanthropic advisor to individual, family and institutional philanthropies; and works with nonprofits on issues of governance, strategy and effective revenue models. She is particularly interested in new approaches to high impact philanthropy and is endlessly curious about the sector. She serves on the board of the National Center for Family Philanthropy.

MARY FRANCE WALKER

Trustee

[William J. and Dorothy K. O'Neill Foundation](#)

Cleveland, OH

**JEAN WHITNEY**

info@shapirofamilyfdn.org

Staff consultant

[**Carl and Ruth Shapiro Family Foundation**](#)

Boston, MA

Jean Whitney is an independent philanthropic consultant who works with families, charitable trusts and private foundations to implement best practices in charitable giving. Her work comprises a range of services, from providing advice on grant making

basics, strategy, governance and succession to researching nonprofit organizations and performing due diligence on nonprofit applicants.

Jean currently serves as a philanthropic advisor at a major Boston law firm and as staff consultant to Boston area family foundations. Previously, she was Executive Director of the Carl and Ruth Shapiro Family Foundation and on the staff at GMA Foundations in Boston and the Charles Stewart Mott Foundation in Michigan. She is co-author of the book, Governance, published by the Council on Foundations as part of its Family Foundation Library series.

Her community involvement includes participation on the board of the Clipper Ship Foundation. Jean is also a past board member of English for New Bostonians, former chair and board member of Associated Grant Makers and a former Board of Overseers member of Newton-Wellesley Hospital.

MARLENE YOUNG

President

[**Delaplaine Foundation, Inc.**](#)

Frederick, MD

**ELLIE FREY ZAGEL**

ellie@successfulgenerations.com

Vice Chair

[**Frey Foundation**](#)

Grand Rapids, MI

Topics of interest: Capacity building; Next-gen engagement; Social entrepreneurship; Succession and legacy

Ellie Frey Zagel is a leadership coach specializing in multi-generational family businesses. She helps next generation leaders thrive in times of uncertainty and crisis. Committed to serving her audience and sharing her expertise, Ellie founded Successful Generations, LLC and launched a same-name podcast for family businesses and philanthropic communities. Ellie has spoken around the country on next generation issues in family business and family philanthropy.

Ellie is also third generation Vice Chair and Trustee of her family's foundation, The Frey Foundation (based in Grand Rapids, MI). For nearly a decade, Ellie has been deeply

involved in working with the next generation of family businesses; first, as Director of the Family Business Alliance and now, as President of Successful Generations.

Ellie earned her Bachelor's degree in international relations and economics from Boston University, and has certificates in Family Business and Family Wealth Advising from the Family Firm Institute.

Ellie serves as a trustee on several nonprofit boards, including The National Center for Family Philanthropy and The Frey Foundation.

SPEAKER DIRECTORY



DIMPLE ABICHANDANI

Executive Director

[General Service Foundation](#)

Dimple Abichandani is the executive director of the General Service Foundation (GSF), a private family foundation that supports organizations building power at the intersection of racial, gender, and economic justice. Dimple joined General Service Foundation in 2015, bringing almost two decades of experience advancing social justice as a lawyer, funder, and educator.



RINI BANERJEE

President

[Jessie Smith Noyes Foundation](#)

Rini Banerjee has two decades of experience in philanthropy. An Integrated Capital Fellow at RSF Social Finance, she has served as Executive Director at Foundation for a Just Society, Program Officer at the Overbrook Foundation, and Program Director at the New York Women's Foundation. She is a trustee of the Mertz Gilmore Foundation and Board member of Funders for Reproductive Equity, and has co-created or served on groups including the NYC-based Asian Women's Giving Circle, Philanthropy Advancing Women's Human Rights, the Groundswell Fund, and the Funders' Collaborative on Youth Organizing. She was a past Board Chair of Asian Americans/Pacific Islanders in Philanthropy (AAPIP) and past Board member of South Asian Youth Action (SAYA!). She holds a master's degree in international affairs from Columbia University and a BSc in finance from NYU's Stern School of Business.



ASHLEY BLANCHARD

Trustee, [Hill-Snowdon Foundation](#)

Senior Associate, [Lansberg Gersick & Associates](#)

Ashley Snowdon Blanchard is a seasoned nonprofit strategy and management consultant, with a focus on strategic planning for family foundations. She heads the philanthropy practice at Lansberg Gersick & Associates, where she helps families create philanthropic institutions that make a meaningful impact in the world, and that provide a rewarding family experience. She also works with enterprising families to develop strategies for integrating their philanthropic and wealth utilization activities into their broader continuity plans.

Ashley works with family foundations to help them clarify and align their social impact and family engagement goals. She helps families define their collective vision for their philanthropy, and then build the structures and programs to support that vision. She applies her deep knowledge of family foundation governance to her consulting work and regularly presents and writes on family philanthropy for the National Center for Family

Philanthropy, Exponent Philanthropy, Grantmakers for Effective Organizations, and regional associations and affinity groups. She is a fourth-generation family trustee of the Hill-Snowdon Foundation and recently joined the board of the National Center for Family Philanthropy. Before coming to Lansberg Gersick & Associates, Ashley worked as a consultant to foundations, first at TCC Group, and later in her own practice.

Ashley is a graduate of Stanford University and the Goldman School of Public Policy at the University of California, Berkeley, where she completed her Master's Degree in Public Policy. She lives in New York City with her husband and children.



JEAN CASE

CEO, [Case Impact Network](#)

CEO, [Case Foundation](#)

Chairman, [National Geographic Society](#)

Jean Case, the Chairman of the National Geographic Society and CEO of the Case Impact Network and Case Foundation, is a businesswoman, investor, philanthropist and internet and impact investing pioneer who is a passionate believer in the power of business to do good and advocates for the importance of embracing a more fearless approach to innovate and bring about transformational breakthroughs. Her career in the private sector, including as a senior executive at AOL, spanned nearly two decades before co-founding the Case Foundation in 1997.

Jean launched the Case Impact Network to expand efforts to usher in a new era of more inclusive capitalism. This work focuses on unleashing business and capital as powerful forces for change and supporting investors to use their capital to promote social change through impact investing.

In addition, Jean currently serves on the boards of National Geographic Partners and the White House Historical Association as well as on the advisory boards of the Brain Trust Accelerator Fund, Smithsonian American Women's History Initiative and Georgetown's Beeck Center. In January 2019, Jean's first book, *Be Fearless: 5 Principles for a Life of Breakthroughs and Purpose*, was published by Simon & Schuster and was named a national bestseller.



LAURA COLLINS

Director, Development and Exempt Organizations

[KPMG](#)

Laura Collins is a Director in KPMG's Exempt Organizations tax practice. Laura has worked exclusively with exempt organizations for more than 25 years. She serves private foundations and public charities along with publicly-traded and privately-held companies relative to their direct and indirect corporate philanthropy efforts. Laura was also selected to provide compliance services to KPMG's own foundation, the KPMG U.S. Foundation. Laura practices as a licensed Certified Public Accountant. A native of Greensboro, North Carolina, Laura attended Salem College where she earned her B.A in History and Economics. Subsequently, Laura earned her Masters of Science of Accountancy from University of North Carolina

at Greensboro. She enjoys cooking, walking her dog, and skiing. As a Board member of ArtsGreensboro, her community's local arts council, she served as Chair of its Grant Committee and as a member of its Governance Task Force. Laura also serves on her local hospital's Institutional Advancement Committee.



JENNIFER DAVIS

Executive Vice President

[The Philanthropy Workshop](#)

Jennifer Davis leads the strategy and curation of The Philanthropy Workshop's global community which encompasses the holistic member journey from learning and connection to action and impact. For nearly 20 years, her professional background has combined global development, media, and philanthropy and she has worked in communications, development, and program design and delivery.

Before joining TPW, she served as senior program officer for the Institute for Philanthropy, whose mission was to increase effective philanthropy in the United Kingdom and internationally. Previously, Jennifer led development activities at American Documentary, producer of PBS's award-winning social issue documentary series POV. Jennifer spent the first decade of her career living and working in diverse international development contexts, including conducting stakeholder surveys to assess local readiness for REDD+ implementation and community-based natural resource management in Indonesia; carrying out socio-impact surveys of dam-displaced populations in Laos; coordinating a public-private partnership targeting SMEs in Turkey; supporting human rights advocacy in Turkey; fundraising for nutrition and rural farming initiatives in Mexico; developing social marketing campaigns for migrant populations at highest risk for HIV infection in China; and editing a bilingual news magazine in Taiwan.

She serves on the board of the Sall Family Foundation and as vice chair of the board of the Robert Flaherty Film Seminar, the longest-running film event in North America. Jennifer graduated from Scripps College with a dual B.A. in political science and cultural studies and completed her Master of International Affairs at Columbia University with a focus on East Asian economic and political development.



CHRISTOPHER FLETCHER

Executive Director, Institutional Portfolio Solutions

[J.P. Morgan](#)

Christopher Fletcher is an Executive Director in J.P. Morgan Institutional Portfolio Solutions. In this role, he is responsible for managing customized discretionary investment portfolios for endowments, foundations and institutional families.

Previously, Mr. Fletcher was a Global Investment Specialist for J.P. Morgan in London, serving as an investment advisor to a range of family offices and charitable organizations in the United Kingdom (UK) and Channel Islands. An employee since 2010, Mr. Fletcher was previously a Portfolio Manager and member of the Investment Strategy team at Schroders Private Bank in London. He was responsible for managing a wide range of discretionary portfolios for families in the UK. Prior to Schroders, Mr. Fletcher trained as an accountant with PricewaterhouseCoopers, providing assurance and business

advisory services to the UK charity and financial sectors.

Mr. Fletcher is a member of the Chartered Institute for Securities and Investment. He received a B.A. with Honors in History. He holds the UK Investment Management Certificate along with the Series 7 and Series 63 designations. He serves on the Board of the South Bronx United in New York.



RON HARRIS

Community Advisor, [The Jay & Rose Phillips Family Foundation of Minnesota](#)

Chief Resilience Officer, City of Minneapolis

Ron Harris is a black millennial focused on political involvement, civic/shareholder engagement, and philanthropy being the best opportunities to improve people's lives. He got his start volunteering for then Senator Barack Obama's campaign for president, and has been involved in different capacities ever since. He played a significant role in the passage and adoption of raising the minimum wage and providing paid sick time to virtually every worker in Minneapolis. He is currently on the Democratic National Committee as the Chairman of the Midwestern Caucus and serves on the highest governing body of the DNC. In his full time capacity, Ron serves as the Chief Resilience Officer for the City of Minneapolis. Ron is also involved in leadership development, consulting, and helping to start the region's only black-led credit union, Village Financial, and also serves as its Board Chair.



KIMBERLY MYERS HEWLETT

President, Myers Family Foundation

Board Member, [Flora Family Foundation](#)

Senior Vice President of Donor Engagement, [Silicon Valley Community Foundation](#)

Kimberly Myers Hewlett is president of the Myers Family Foundation and a board member of the Flora Family Foundation. She is also the Senior Vice President of Donor Engagement at the Silicon Valley Community Foundation. Previously, she worked for Rockefeller Philanthropy Advisors and most recently served as Associate Director for Corporate and Foundation Relations at the Stanford University Medical School. She is an alumna of The Philanthropy Workshop West, a "boot camp" for emerging philanthropists. Hewlett received her undergraduate degree from Stanford University and an MBA from the Kelley School of Business at Indiana University. She currently lives in Mountain View, California with her husband Billy and two children.

**RENEE KAPLAN**

CEO

The Philanthropy Workshop

Renee Kaplan is former chief strategy officer and head of programs at the Skoll Foundation where she oversaw the Skoll Award for Social Entrepreneurship, the Skoll World Forum, strategic alliances, and communications.

Renee has more than 20 years of business experience in corporate, entrepreneurial, and foundation sectors. Her professional background includes eight years at Microsoft in corporate and international marketing—working directly with executive leadership and spending considerable time in India, Latin America, Africa, and the Middle East. Following Microsoft, she was founder and CEO of an e-commerce startup, FutureWorkplace, Inc., which was eventually sold. As an entrepreneur, she was active in Young Entrepreneurs Organization (Y.E.O.) and was named to the “40 Under 40” list by the *Puget Sound Business Journal* recognizing the region’s visionary business leaders. After selling her business, she spent six years as executive vice president of the Casey Family Programs Foundation, focusing on improving outcomes for vulnerable children and families in the U.S. Prior to her role at Skoll, she was the principal of RKaplan Consulting, and partnered with clients including The Bill & Melinda Gates Foundation and The Giving Pledge, Trusera Corporation, the Palo Alto Unified School District, Stanford University Center on Philanthropy and Civic Society, and The White House Council on Community Solutions.

Renee holds a Bachelor of Arts degree from the Edward R. Murrow School of Journalism (with an emphasis in International Studies) at Washington State University and has a passion for advising entrepreneurs and social ventures. She lives in the San Francisco Bay Area with her husband and two sons and is a competitive soccer player.

**ANDRAS KOSARAS**

Counsel

Arnold & Porter

Andras Kosaras represents domestic and international tax-exempt organizations on a broad range of regulatory, transactional and operational matters, including structuring domestic and international programs, grantmaking, and business ventures. He also represents individuals and corporate donors on charitable giving. In addition, working with the firm’s legislative team, Mr. Kosaras

monitors and provides advice on legislative and regulatory tax proposals affecting tax-exempt organizations.

He advises exempt organizations on executive compensation, private foundation rules, unrelated business income tax, mergers, joint ventures and the establishment of for-profit subsidiaries, as well as on managing investments and endowments, including mission- and program-related investments. He advises exempt organizations involved in tax and governance controversies, including internal investigations, disputes over charitable gifts and gift restrictions, internal investigations, and examinations by the IRS and state charity regulators.

**DANA LANZA**

President, CEO, and Co-founder

Confluence Philanthropy

Dana Lanza is the President, CEO, and Co-Founder of Confluence Philanthropy. Dana launched Confluence Philanthropy in August of 2009 as a special project of Rockefeller Philanthropy Advisors, after serving as the executive director of the Environmental Grantmakers Association (EGA). While at EGA, Dana provided networking services to over 250 grantmaking organizations from across North America and Europe in 15 strategic funding areas. As director, Dana worked with the Rockefeller Family Fund, and led a then 20 year old EGA into an independent 501c3 organization.

From 2009-2011 Dana served as the Program Director and Board Advisor at The Swift Foundation while launching Confluence. Swift makes grants internationally in the environment, indigenous and rural communities, and climate change initiatives. Swift is also deeply committed to mission-related investing.

Prior to Philanthropy, Dana founded Literacy for Environmental Justice (LEJ), which brought free urban environmental education projects to more than 10,000 public school students, while employing hundreds of at risk youth as community advocates. She acted as a lead organizer in the closure of San Francisco's infamous Hunters Point Power Plant; envisioning and raising funds to supplant it with the region's first off-the-grid educational Eco Center. The Eco Center won the EPA's National Environmental Justice Award after its grand opening in 2010. A recipient of several environmental awards, she has presented at Bioneers, the American Public Health Association, Investors' Circle, and the European Foundation Center, among others. In 2005, she contributed to the Sierra Club Books anthology entitled Ecological Literacy: Educating Our Children for a Sustainable World.

She was a fellow with the Donnell Meadows Leaders Fellowship Program in Systems Theory and the California Women's Foundation Policy Institute. Currently she serves formally as an advisor to The Industry Advisory Council to the U.S. impact Investing Alliance and on the founding Board of The Maasai Fund-Osotua, the first Maasai-led philanthropy.

Beyond this, Dana has lived and worked among tribal people for much of her life. At 20 she lived at the village level among the Samburu (Maasai) for eight years. Twenty-four years later she undertook the Samburu's traditional rites, becoming one of the few westerners ever initiated and a daughter of the L'Lorokgushu clan. More briefly Dana lived and worked with the Cheyenne River Lakota in South Dakota, and Kosovan Roma refugees in Europe. Dana speaks Swahili, Maa, and Spanish conversationally. A nomad in spirit, Dana migrates between Oakland, California; Bed Sty, Brooklyn, NY; and Kenya.

**TAMARA LARSEN**

Executive Director, Mission-Aligned Investing

Agility

Tamara Larsen is an Executive Director with Agility, where she leads the Mission-Aligned Investment practice of the firm and sits on the Agility Investment Committee. Tamara is responsible for partnering with clients to further align their investment portfolio with their mission. She has +20 years of investment experience.

Prior to joining Agility/PWP, Tamara was at Russell Investments, where she most recently served as Head of Private Markets Research and was a portfolio manager for a thematic mission-aligned mandate. Prior to Russell, Tamara was Senior Vice President of Centerline Capital Group, where she was a portfolio manager and acquisitions officer for a real estate joint venture with California Public Employees' Retirement System ("CalPERS"). Tamara also held real estate acquisitions roles at Lehman Brothers, Thor Equities, and J.P. Morgan.

Tamara earned a MSc in Real Estate Development from the Massachusetts Institute of Technology, where she was a Toigo Foundation fellow, and a B.A. in Economics from Smith College. She serves on the boards of Colorado PBS12 and a renewables venture focused on Africa. She is a member of the Investment Committee for the David Rockefeller Fund, and the Steering Committee for the Intentional Endowments Network.

**PAUL LIU**

Managing Director, Private Client Practice

Cambridge Associates

Paul Liu is a Managing Director in the Private Client Practice at Cambridge Associates. He is based in San Francisco following a posting in Sydney, where Paul helped grow the firm's advisory practice with institutional and family investors in Australia, New Zealand, Singapore and Hong Kong. He currently partners with eleven clients managing roughly \$5 billion in total assets.

Paul works on a broad range of general investment issues including asset allocation, portfolio construction, and manager selection. He is also responsible for the design, implementation, and oversight of custom hedge fund programs as well as the evaluation of new and established hedge fund managers.

Prior to joining Cambridge Associates in 2005, Paul was a Vice President at Beacon Pointe Advisors, where he helped nonprofit institutions with general investment issues and led the firm's research efforts in alternative assets. While in business school, Paul was a sector analyst at a long/short equity hedge fund. Prior to that, he was a Product Specialist at Morgan Stanley and an analyst at Montgomery Securities.

Paul is a member of the Board of Directors of the Gumerlock Family Foundation. He is also a member of the Investment Committee at the Educational Foundation of Orinda.

**JAIMIE MAYER**

Board Chair

[Nathan Cummings Foundation](#)

Jaimie Mayer currently serves as Board Chair of The Nathan Cummings Foundation. Prior to her appointment as the first member of her generation to serve as Board Chair, she served on the board of the foundation for 18 years. In the philanthropic space, Jaimie is a consultant working predominantly with next gen philanthropists as well as nonprofits looking to expand their reach to the next gen. She is also a theatre producer, having produced both on Broadway and off, as well as serving as the Managing Director of Magic Theatre in San Francisco. She holds an MFA in Theatre Management and Producing from Columbia University's School of the Arts, and is currently pursuing her Executive MBA from NYU Stern School of Business.

**MARY MOUNTCASTLE**

Trustee, [Mary Reynolds Babcock Foundation](#)

Trustee, [Z. Smith Reynolds Foundation](#)

Distinguished Fellow, [National Center for Family Philanthropy](#)

Mary Mountcastle is a trustee of the Z. Smith Reynolds and Mary Reynolds Babcock Foundations, a board member of Demos, and has served on the boards of numerous state and national organizations. She is former board chair of the National Center for Family Philanthropy, and in 2018 was named as an NCFP Distinguished Fellow. Previously, Mary was a senior manager at Self-Help, the nation's largest nonprofit community development lender, and served in senior positions at the Center for Responsible Lending and MDC Inc, a nonprofit policy research center as well as other private and public sector organizations. Mary holds an MBA from the Yale School of Management and a BA from Williams College.

**KELLY NOWLIN**

Trustee, [Surdna Foundation](#)

Fellow, [National Center for Family Philanthropy](#)

Kelly Davenport Nowlin, a fifth generation member of the Andrus family, was elected as a Surdna Foundation trustee in 2010. She chairs the committees of the Andrus Family Program (AFP) and Centennial Working Group. As chair of the AFP, Kelly is responsible for outreach to, and engagement of close to 500 living descendants of Surdna founding patriarch, John E. Andrus. Kelly is guiding the development of activities marking Surdna's 100th anniversary.

Prior to her board service at Surdna, Kelly was a founding board member of the Andrus Family Fund (AFF), an independent grantmaker launched by Surdna in 2000 as a grantmaking fund for fifth generation family members. She helped develop the fund, including program areas, governance and bylaws, mission and strategic vision, and committees of the board. Kelly served as Vice Chair, then Co-Chair for four years of her seven year term.

Currently, Kelly is Principal of KDN Philanthropy Consulting, and advises family foundations and non-profit organizations on next generation engagement, governance, organizational culture and communications strategies. Kelly is an honors graduate of Boston College with a BA in Communications and currently lives in Hopkinton, Massachusetts with her husband and two teenage children.



MAYA PATEL

Executive Chairwoman

[Tarsadia Foundation](#)

Maya Patel is the Executive Chair of the Tarsadia Foundation, leading the development of its vision, programs, and partnerships in the philanthropy community. She was born in Zambia and grew up in Anaheim, and maintains strong ties to her family roots.

Maya is actively engaged with local and international partners in steering and guiding change to create impact. Maya serves on the board of several organizations including Cal State Fullerton Foundation and Sage Hill School. Previously, she held multiple leadership positions at Tarsadia Hotels, a privately-owned hotel investment, development, and management company. She enjoys spending quality time with her loving husband and their four daughters. In her free time, she can often be found at her family's organic farm.



IRENE PRITZKER

President and CEO

[IDP Foundation](#)

Irene Pritzker became a founding member and President of the IDP Foundation, Inc. in 2008. It is her belief that education is the way to conquer the world's greatest challenges, and that everyone should have equal access to education to provide hope, opportunity and economic impact on their homeland. The IDP Foundation is dedicated to developing and supporting programs that are

sustainable and move away from aid dependent models. She believes a combination of smart philanthropy and investment solutions can be galvanized to make that future a reality.



GREG RATLIFF

Vice President, [Rockefeller Philanthropy Advisors](#)

Board Member, [Confluence Philanthropy](#)

Greg Ratliff is a Vice President at Rockefeller Philanthropy Advisors' New York office beginning in 2019 and manages client engagements with a range of individual, family and corporate donors. As part of Rockefeller Philanthropy Advisors' impact investing practice, he advises investors on portfolios to generate both social and financial returns. Prior to Rockefeller Philanthropy Advisors, Greg was a

member of leadership team at the newly launched ACT Center for Equity in Learning. Greg held several positions at the John D. and Catherine T. MacArthur Foundation, where he created an impact investment portfolio defined at five percent of institutional assets.

He doubled the annual rate of investing to \$20 million and initiated multi-year grant and investment programs in the areas of affordable housing preservation and community development venture capital. Greg also worked at the Bill & Melinda Gates Foundation, where he was responsible for developing strategies to increase the engagement of low-income young adults in postsecondary education. Greg holds a BA from UCLA and earned his MBA from Northeastern University, while also completing graduate work in Urban Studies at MIT. He is a Board member at Domini Impact Equity Funds.



VALERIE ROCKEFELLER

Trustee

[Rockefeller Brothers Fund](#)

Valerie Rockefeller chairs the board of the Rockefeller Brothers Fund, a private foundation advancing social change that contributes to a more just, sustainable, and peaceful world. Her professional background is as a middle school special education teacher for adolescents with learning differences and emotional disabilities. She began her teaching career at Central Park East Secondary School in

East Harlem, New York, and also taught in Australia.

Valerie has a M.Ed. in Special Education from Bank Street College of Education and a MAT in secondary Social Studies from Columbia University Teachers College. She majored in International Relations at Stanford University, and worked as a confidential assistant to Secretary Richard Riley at the U.S. Department of Education during the first Clinton administration. She also serves as a trustee of Achievement First, the Asian Cultural Council, Columbia University Teachers College, D.C. Preparatory Academy, Greenwich Academy, the Gilder Lehrman Institute of American History, and Rockefeller Philanthropy Advisors. She was a trustee of Spelman College, and is a member of the Council on Foreign Relations.

Valerie lives with her daughters Percy and Lucy and her son Davis in Old Greenwich, Connecticut.



SHAADY SALEHI

Director

[Trust-Based Philanthropy Project](#)

Shaady Salehi is the director of the Trust-Based Philanthropy Project, a 5-year learning and advocacy initiative to make trust-based practices the norm in the philanthropic sector. Throughout her career, Shaady has worked in various social sectors using strategic communications to galvanize coalitions, establish legacies, generate buy-in, and strengthen networks. Previously, Shaady was

Managing Director of Distribution and Impact at ITVS, where she led a team to advance the reach and impact of documentaries on public television. Prior to ITVS, she was Executive Director of Active Voice, a pioneering organization that uses storytelling to catalyze social change. Shaady is a 2014 Aspen Institute Fellow and sits on the board of Let It Ripple, a nonprofit that experiments with collaborative filmmaking for the common good. She holds an M.S. in Strategic Communications from Columbia University, an M.A. in Anthropology from UC Davis, and a B.A. in Anthropology from Oberlin College.

**ANDREW SCHULZ**

General Counsel

Arabella Advisors

Andrew Schulz is General Counsel for Arabella Advisors. Previously, he was executive vice president and national director of community and legal relations at Foundation Source and prior to that served as vice president for government relations and public policy at the Council on Foundations, where he provided assistance and consultation to council members and the public, and he oversaw the council's legislative initiatives, as well as outreach efforts to members, nonprofits, policymakers, and the public. Prior to this, he was an associate at a law firm in Washington, D.C., where he specialized in laws affecting nonprofits. Mr. Schulz is a frequent speaker on legal and public policy issues affecting nonprofits. Several of his articles relating to nonprofits have been published. Mr. Schulz holds a J.D. from the George Washington University Law School.

**JANICE SIMSOHN SHAW**

Facilitator and consultant

Janice Simsohn Shaw is an adept, high-energy facilitator with 20 years of experience helping philanthropic and social change leaders to be better partners, listeners, and givers. She is a passionate and vocal advocate for the power of communal learning and action, proudly serving a diverse range of inspiring groups in helping move their work forward in meaningful ways.

As a consultant, she has designed leadership programs, facilitated convenings, meetings and retreats of all sorts, provided external grantmaking assessments, and trained others in the fine and fun art of facilitation – some of her very favorite work!

In the philanthropic sphere, Janice has designed and facilitated leadership development programs for Next Gen philanthropists and executive directors. Her writing has been published on a topics including capacity building, investing in non-profit leaders, program-related investments, facilitation, multi-generational philanthropy, and engaging young people in giving. She is a popular trainer at conferences in the sector.

Prior to her work in DC, she served the environmental field and the Jewish community, working for a number of non-profit organizations, and worked as a journalist and fact-checker. Janice studied at Skidmore College and Oxford University, and is a proud alumna of the National Outdoor Leadership School (NOLS Alaska). She has training from The Social Transformation Project, the Interaction Institute for Social Change and the Center for Civic Reflection.



LIESEL PRITZKER SIMMONS

Co-founder and Principal, [**Blue Haven Initiative**](#)

Co-founder, [**IDP Foundation**](#)

Liesel Pritzker Simmons is Co-Founder and Principal of Blue Haven Initiative, where she oversees, as an investment strategist, a portfolio focused on holdings that generate competitive financial returns and address social and environmental challenges. The portfolio spans asset classes, from traditional equities and direct investments to philanthropic programs.

Liesel co-founded Blue Haven with her husband, Ian Simmons. Together, they systematically assessed their portfolios based on environmental, social and corporate governance (ESG) criteria and financial performance. The restructured portfolios became the foundation of Blue Haven, one of the first family offices created with impact investing as its focus.

Liesel is also Co-Founder of IDP Foundation, a private Chicago-based foundation focused on achieving universal primary education. There, she helped create the IDP Rising Schools Program, which leverages microfinance networks to empower nearly 450 low-cost private schools—established and managed by local entrepreneurs—in some of the least-developed regions of the world.

Liesel, an engaging and sought-after speaker on impact investing and Next-Gen investors, serves on for-profit and nonprofit boards and investment committees of organizations including ImpactAssets, Synergos, Toniic, Eco-Post, and The ImPact, a network of families committed to the conscientious stewardship of wealth.

Liesel attended Columbia University in New York City, where she studied African History. She lives in the Boston area with Ian and their daughters.



KATHLEEN SIMPSON

Chief Financial Officer and Interim CEO

[**The Russell Family Foundation**](#)

Kathleen is the Interim Chief Executive Officer and Chief Financial Officer of The Russell Family Foundation, where she collaborates with the board to guide the Foundation's strategic planning, programs and community affairs, and oversees the Foundation's impact investing, finance, risk management, information technology and operations. She has extensive experience with both for-profit

and nonprofit development, and the financial advising of many entities, including deep involvement in operations. Prior to joining the Foundation, she was Director of Finance for an independent wealth management firm serving individuals, multigenerational families and foundations. She also founded and operated a public accounting firm providing CFO services to businesses, high-net-worth individuals and non-profits for more than a decade. Kathleen is a certified public accountant and holds a Master of Business Administration degree. She is a member of the American Institute of Certified Public Accountants and the Washington State Society of Certified Public Accountants and serves on the board of directors for Confluence Philanthropy.

**ROBIN SNIDOW**

Board Chair

General Service Foundation

Robin Snidow has been a board member of General Service Foundation (GSF) for 25 years and the Board Chair of GSF since 2007. She is GSF's 3rd board chair, following in the footsteps of her grandfather. Robin served as a program officer for the Reproductive Health and Rights program at GSF. Robin's community leadership includes service on non-profit boards supporting women's self-sufficiency and public education in her home town of Denver.

**NICK TEDESCO**

President and CEO

National Center for Family Philanthropy

Nick Tedesco is the President and Chief Executive Officer of the National Center for Family Philanthropy (NCFP).

Prior to joining NCFP, Nick served as a Senior Advisor in the J.P. Morgan Philanthropy Centre where he provided clients with insights and services to help meet their philanthropic goals through

innovative advice, thought leadership and opportunities for learning and collaboration.

Previously, Nick served as a Relationship Manager and Program Officer at the Bill & Melinda Gates Foundation, where he helped launch the Giving Pledge—an effort led by Bill and Melinda Gates and Warren Buffett to encourage the world's wealthiest individuals and families to commit the majority of their wealth to philanthropy. In this role, Nick managed relationships with current and prospective members of the pledge, as well as their staff and advisors. He helped to connect global philanthropists with one another in effort to exchange knowledge and encourage collaboration.

Nick began his career in the social sector as the Deputy Director of the Children's Health Forum—a national nonprofit focused on the prevention and eradication of childhood diseases that disproportionately impact underserved communities.

Nick was named to the inaugural Chronicle of Philanthropy 40 Under 40 ranking in 2016. He has been quoted in the New York Times, Wall Street Journal MarketWatch, San Francisco Business Times and other notable publications. He serves on the Regional Board for UNICEF USA and as a panelist for the Echoing Green Fellowship and MacArthur Foundation 100&Change Initiative.

Nick received a B.A. from Villanova University.

**PATRICK TROSKA**

Executive Director

[The Jay & Rose Phillips Family Foundation of Minnesota](#)

Patrick J. Troska has been with The Jay & Rose Phillips Family Foundation of Minnesota since 2000 when he was hired as a Program Officer. He was named Executive Director in January 2011, then President in 2018. In addition to providing leadership for the Foundation's overall strategy, he also leads a couple special initiatives focused on real estate and community development in North Minneapolis. In the late 1990's, he was a Fund Distribution and Community Initiatives Manager for the United Way of the Saint Paul Area. Patrick began his career in youth services. He earned a Bachelor of Arts in theology and social work from St. John's University in Collegeville MN, and holds a Master of Arts in Leadership from Augsburg College, Minneapolis. He chaired the board of directors of the Minnesota AIDS Project from 2010-12, and chaired the Heading Home Minnesota Funders Collaborative from 2015-2017. He currently sits on the board of directors of the Association for Black Economic Power, which is charged with opening Village Financial Cooperative, the only Black-led financial institution in Minnesota.

**PETER WILLIAMSON**

Next-gen Family Member

[Kettering Family Foundation](#)

Peter Williamson is a professional golfer and founder of Game Genius, a social venture in DC that uses non-digital games to empower individuals and teams. He is a 5th generation member of the Kettering family.

**JUNE WILSON**

Executive Director Emerita and Board Member, [Quixote Foundation](#) Fellow, [National Center for Family Philanthropy](#)

June Wilson, executive director emerita and board member of the Quixote Foundation, combines her talent as a dancer and choreographer with the operational expertise of a COO and strategic acumen of a CEO. She understands people's physical and emotional interactions within a literal, conceptual or practical space and can quickly translate what she sees into strategic systems. Her unique approach has strengthened nonprofits like the Minnesota Dance Alliance in Minneapolis and the National Performance Network in New Orleans. At Quixote she artfully guided the design and implementation of their "Spend Up" approach to operating within a strategic lifespan and transformed the foundation's commitment to racial equity. She looks forward to her next stage, where she'll continue to translate movement into meaningful patterns for those working for social change.

**DANIELLE ORISTIAN YORK**

Executive Director and President

[21/64](#)

Danielle Oristian York is a speaker, consultant and trainer working with those who seek to change the future through a strategic and operational exploration of values and identity. She is an internationally recognized expert on multigenerational and next generation philanthropy and family decision making and works with individuals, families and organizations in this capacity.

As executive director of 21/64, a nonprofit practice founded to serve philanthropic and enterprising families, she and her partners develop and train on catalytic tools for transforming how individuals and families articulate their values and use them as benchmarks for decision making, both now and in the future.

Danielle's experience working in wealth management, a family office and the non-profit space has given her different vantage points from which to catalyze and support strategic decision making. With more than 15 years of experience, a constant curiosity and warm presence, new and seasoned philanthropists, as well as the advisors who serve them, are drawn to her as they navigate what is next. Prior to joining the 21/64 Team, Danielle worked at UBS and Pitcairn Family office. She is married, with two children, and lives on the south shore of Boston.

**ELLIE FREY ZAGEL**

Vice Chair

[The Frey Foundation](#)

Ellie Frey Zagel is a leadership coach specializing in multi-generational family businesses. She helps next generation leaders thrive in times of uncertainty and crisis. Committed to serving her audience and sharing her expertise, Ellie founded Successful Generations, LLC and launched a same-name podcast for family businesses and philanthropic communities. Ellie has spoken around the country on next generation issues in family business and family philanthropy.

Ellie is also third generation Vice Chair and Trustee of her family's foundation, The Frey Foundation (based in Grand Rapids, MI). For nearly a decade, Ellie has been deeply involved in working with the next generation of family businesses; first, as Director of the Family Business Alliance and now, as President of Successful Generations.

Ellie earned her Bachelor's degree in international relations and economics from Boston University, and has certificates in Family Business and Family Wealth Advising from the Family Firm Institute.

Ellie serves as a trustee on several nonprofit boards, including The National Center for Family Philanthropy and The Frey Foundation.

PROGRAM AGENDA

The most up-to-date version of the agenda can be found on the [event website](#) (use passcode **tei2020**). All times are Eastern.

WEDNESDAY, SEPTEMBER 23

9:30am-10:50am | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.

11:30am-11:45am | Introductions & Schedule Overview

Welcome to NCFP's 2020 Trustee Education Institute! NCFP staff will review our Trustee Education Institute schedule, speakers, and Zoom technology, and then we will hear introductions from participants.

Join the session with the Zoom link: <https://us02web.zoom.us/j/85712842303> and Webinar ID: 857 1284 2303

11:45am-12:30pm | Translating Shared Values into Action

What motivates you and your family to give? Are you called to advance a particular grantmaking mission? Or are you interested in creating an opportunity for family members to come together and strengthen family ties through philanthropy and service to others? Or is it both? Regardless, the ability to work together with other members of your family to translate values into action is fundamental to your success. In this session, participants will hear stories of multigenerational families and personal perspectives on family values, evolving mission and community needs, and family engagement.

Join the session with the Zoom link: <https://us02web.zoom.us/j/85712842303> and Webinar ID: 857 1284 2303

12:30pm-12:40pm | Break

12:40pm-1:40pm | Understanding and Managing Family Systems

Family philanthropy is complicated. It's an effort that solves for many distinct and diverse opinions—one that often amplifies the dynamics of a family. Understanding the culture of our family and the dynamics that exist raises awareness about the

way a family views identity, purpose, beliefs about money and giving, and how these views impact our decisions. Participants will gain an understanding of family systems allowing them to move with more intention, leveraging the strengths of their family systems, and plan for the predictable patterns that emerge in various conditions.

Join the session with the Zoom link: <https://us02web.zoom.us/j/83825641893> and Meeting ID: 838 2564 1893

1:40pm-1:45pm | Technology Break

1:45pm-2:45pm | Fundamentals of Good Family Philanthropy Governance

Effective governance is the mainstay for a successful family philanthropy effort. But what is governance and how is it adopted into a giving practice? Join family philanthropy experts and practitioners to explore how to adopt principles, policies and practices that will organize your giving. We encourage all participants to bring questions and dilemmas to this interactive conversation on how orient your family for success through proper decision-making strategies.

Join the session with the Zoom link: <https://us02web.zoom.us/j/83129201117> and Webinar ID: 831 2920 1117

2:45pm-3:00pm | Break

3:00pm-3:45pm | Donor Perspectives: The Importance of Being Fearless with Jean Case

Jean Case, the Chairman of the National Geographic Society and CEO of the Case Impact Network, is a businesswoman, investor, philanthropist, and internet and impact investing pioneer who advocates for the importance of embracing a more fearless approach to innovate and bring about transformational breakthroughs. Jean will join NCFP President Nick Tedesco to share her experiences and illuminate five principles for a life of purpose and bold action.

Join the session with the Zoom link: <https://us02web.zoom.us/j/86594577081> and Webinar ID: 865 9457 7081

3:45pm-4:00pm | Quick Check Out & Announcements

A brief recap of the day and preview of Day Two of the Institute.

Join the session with the Zoom link: <https://us02web.zoom.us/j/86594577081> and Webinar ID: 865 9457 7081

4:00pm-5:20pm | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.

4:00pm-5:20pm | Ask the Investment Director (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Investment Director will be an opportunity for attendees to meet privately with an investment expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Paul Liu, Managing Director, Private Client Practice at Cambridge Associates, will be available for individual Ask the Expert sessions throughout the event.

THURSDAY, SEPTEMBER 24

9:30am-10:50am | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.

11:30am-11:45am | Opening & Announcements

A welcome from NCFP staff leadership and preview of Day Two of the Institute.

Join the session with the Zoom link: <https://us02web.zoom.us/j/87610635700> and Webinar ID: 876 1063 5700

11:45am-1:00pm | Fiduciary Responsibilities and Legal Pitfalls

Join this session to better understand the fundamental and complex federal and state laws regulating charitable giving including self-dealing, payout, fiscal agency, excise tax, required filings, and much more. Arcane concepts made accessible—and fun—by one of the nation's leading experts on family foundation tax law.

Join the session with the Zoom link: <https://us02web.zoom.us/j/87610635700> and Webinar ID: 876 1063 5700

1:00pm-1:15pm | Break

1:15pm-2:00pm | Embracing the DEI Journey: A Call to Courage

Promoting diversity, equity, and inclusion is an essential strategy for any family seeking to deepen impact and ensure that philanthropic goals and desires translate to enduring results. In this session, participants will hear from NCFP's current class of Fellows as they share their personal journeys of learning and discovery, provide practical tips and suggestions for fully embracing a commitment to racial equity and inclusion in giving and governance strategies.

Join the session with the Zoom link: <https://us02web.zoom.us/j/81025370766> and Webinar ID: 810 2537 0766

2:00pm-2:10pm | Break

2:10pm-2:55pm | Breakout Session Option #1: Grantmaking Strategy

Grantmaking is key to the impact of any giving family. Learn about various strategies engaged by giving families and how to refine your strategy and engage your family to fit your grantmaking goals, values, and governance structure.

Join the session with the Zoom link: <https://us02web.zoom.us/j/84860601705> and Meeting ID: 848 6060 1705

2:10pm-2:55pm | Breakout Session Option #2: Navigating Wealth, Privilege, and Values—Charting Your Own Path

Recent turbulent times have made privilege—of wealth, health, community, employment, race, and more—increasingly apparent. Some next gen donors feel guilt related to the privilege of their wealth, especially when so many are struggling to meet basic needs; while older generations, particularly those who have made the wealth, may not see privilege through the same lens. The zeitgeist around acknowledging, understanding and leveraging privilege towards positive change has gained momentum. In this breakout, we will consider how to use what we have towards greater purpose and meaning. During this reflective, highly interactive workshop, you will:

- Examine what privilege means to you & explore the messages you have received about your resources.
- Clarify the values & messages you aspire to align with your giving.
- Explore with peers how to make meaning and connection around these topics
- Envision how you can leverage your privilege of all sorts in a journey towards ever more impactful and meaningful giving and change-making
- Come away with practical ideas & refreshed energy

Join the session with the Zoom link: <https://us02web.zoom.us/j/83254412369> and Meeting ID: 832 5441 2369

2:10pm-2:55pm | Breakout Session Option #3: Values-aligned Investing 101

All investments have the potential for impact. How can you pursue investments that promote values alignment across asset classes, investment vehicles, and advocacy strategies? Options include cash, proxy voting, shareholder engagement, program-related investing, screening public equities, private equity, and more. In this “101” session led by staff and board leaders from Confluence Philanthropy, you’ll explore options for aligning capital in all its forms with your values and mission.

Join the session with the Zoom link: <https://us02web.zoom.us/j/82841486991> and Webinar ID: 828 4148 6991

2:10pm-2:55pm | Breakout Session Option #4: Flipping the Script: Shifting Foundation Power to Community

Changing the ways we do things as foundations is not easy. We have systems and processes that have worked very well for us for many years, even if these same systems and processes have not worked so well for the nonprofits we fund or the issues we care about. What happens when a foundation deeply listens to the community and then changes its approach so that the community has more voice and the foundation takes more direction from the activists and leaders on the ground? Using real life examples of shifting power away from the foundation and to community, you will learn what went well, what went wrong, and lessons to help you think about how you build authentic trust and shift power to community.

Join using the Zoom link: <https://us02web.zoom.us/j/85192084966> and Meeting ID: 851 9208 4966

2:55pm -3:00pm | Technology Break

3:00pm-3:45pm | Donor Perspectives: A Conversation with Irene Prizker and Liesel Pritzker Simmons

Family philanthropy is an ever-evolving journey—one that often has points of unity and divergence. Many giving families will reach a point in their history when individual family members are keen to explore their own identity and chart their own path; however, it doesn’t mean that partnership and collaboration is lost. In this session, participants will hear two generations of philanthropists discuss strategies for impact as well as the challenge of balancing personal and shared interests to support successful philanthropic initiatives.

Join the session with the Zoom link: <https://us02web.zoom.us/j/83490946260> and Webinar ID: 834 9094 6260

3:45pm-4:00pm | Quick Check Out & Announcements

A brief recap of the day and preview of Day Three of the Institute.

Join the session with the Zoom link: <https://us02web.zoom.us/j/83490946260> and Webinar ID: 834 9094 6260

4:00pm-5:20pm | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.

4:00pm-5:20pm | Ask the Investment Director (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Investment Director will be an opportunity for attendees to meet privately with an investment expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Paul Liu, Managing Director, Private Client Practice at Cambridge Associates, will be available for individual Ask the Expert sessions throughout the event.

FRIDAY, SEPTEMBER 25

9:30am-10:50am | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.

11:30am-11:45am | Opening & Announcements

A welcome from NCFP staff leadership and preview of the final day of the Institute.

Join the session with the Zoom link: <https://us02web.zoom.us/j/89650837803> and Webinar ID: 896 5083 7803

11:45am-12:40pm | Numbers Can Tell a Story: Investments and Impact

Philanthropy is more than giving of one's time and money; it is the responsible stewardship of capital for the greater good. During this session, experts will describe the annual reporting requirements of private foundations, how the capital assets of endowments and foundations can be deployed to accomplish your organization's mission, and strategies and potential challenges of investing in a down market. The discussion will provide a fresh lens on how to manage risk of grants, program and mission investments, and traditional investments while achieving your foundation's desired impact on the world.

Join the session with the Zoom link: <https://us02web.zoom.us/j/89650837803> and Webinar ID: 896 5083 7803

12:40pm-12:45pm | Technology Break

12:45pm-1:30pm | Trust-based Family Philanthropy

In this session, learn about the trust-based framework and how these practices align with family legacy and values through an interview with a family foundation executive director and board chair. How do trust-based practices play out at the staff and board level in their work with community partners, and what are the benefits of this approach? Participants will learn about how foundations and grantees both benefit from a trust-based lens, and will have a chance to consider practical next steps to build more productive and balanced funder-grantee relationships.

Join the session with the Zoom link: <https://us02web.zoom.us/j/87377544524> and Meeting ID: 873 7754 4524

1:45pm-1:55pm | Break

1:55pm-2:40pm | Breakout Session Option #1: Grantmaking Strategy

Grantmaking is key to the impact of any giving family. Learn about various strategies engaged by giving families and how to refine your strategy and engage your family to fit your grantmaking goals, values, and governance structure.

Join the session with the Zoom link: <https://us02web.zoom.us/j/84070686397> and Meeting ID: 840 7068 6397

1:55pm-2:40pm | Breakout Session Option #2: Consensus and Decision Making

Join next-gen family giver and game social entrepreneur Peter Williamson for an interactive, engaging round of the game Consensus! In this interactive session, we will draw upon our personal ethics and views as we debate key family philanthropy topics. Following the game, participate in facilitated small group discussions that will help you learn a bit more about your peers, and how to find common ground and make effective decisions with your own board!

Join the session with the Zoom link: <https://us02web.zoom.us/j/81769657638> and Meeting ID: 817 6965 7638

1:55pm-2:40pm | Breakout Session Option #3: Investing with a Racial Equity Lens

What is the role of racial equity in the investment strategies and processes of your foundation? How can you embed racial equity in your investment committee meetings and decisions regarding capital deployment? Achieving racial equity is typically presented as daunting, perhaps even unattainable. But change is possible with sincere commitment, clear goals, and measurable benchmarks. Join this discussion with three leaders of Confluence Philanthropy's 2020 Belonging Pledge for tips and suggestions on how to invest with a racial equity lens.

Join the session with the Zoom link: <https://us02web.zoom.us/j/85014174890> and Meeting ID: 850 1417 4890

1:55pm-2:40pm | Breakout Session Option #4: Flipping the Script: Shifting Foundation Power to Community

Changing the ways we do things as foundations is not easy. We have systems and processes that have worked very well for us for many years, even if these same systems and processes have not worked so well for the nonprofits we fund or the issues we care about. What happens when a foundation deeply listens to the community and then changes its approach so that the community has more voice and the foundation takes more direction from the activists and leaders on the ground? Using real life examples of shifting power away from the foundation and to community, you will learn what went well, what went wrong, and lessons to help you think about how you build authentic trust and shift power to community.

Join the session with the Zoom link: <https://us02web.zoom.us/j/82035808137> and Meeting ID: 820 3580 8137

2:40pm-2:45pm | Technology Break

2:45pm-3:35pm | Donor Perspectives: A Conversation with Valerie Rockefeller

How do you bring your personal passions and perspectives to a shared philanthropic effort? How do you forge an identity that is unique but inclusive of your family? How do you balance the opportunities and expectations of legacy? And what tools are available to make the most of your philanthropic assets and capital? NCFP President Nick Tedesco will explore these and other timely questions in this intimate conversation with long-time friend and colleague Valerie Rockefeller.

Join the session with the Zoom link: <https://us02web.zoom.us/j/88986300034> and Webinar ID: 889 8630 0034

3:35pm-4:00pm | Closing & Future Opportunities for Engagement

Hear about ongoing opportunities to connect and learn from NCFP and its partners, and learn how to sign up for peer cohorts that will be meeting following TEI in the areas of next gen leadership, racial equity, and strategic grantmaking.

Join the session with the Zoom link: <https://us02web.zoom.us/j/88986300034> and Webinar ID: 889 8630 0034

4:00pm-5:20pm | Ask the Attorney (optional, separate signup required)

[Sign up for one of the 20-minute, one-on-one meetings here.](#)

Ask the Attorney will be an opportunity for attendees to meet privately with a legal expert to discuss issues pertinent to the management of their foundation. Attendees will gain valuable advice and insights from a seasoned professional through these one-on-one meetings. Andras Kosaras, Counsel at Arnold & Porter, will be available for individual Ask the Expert sessions throughout the event.